

CLAIMS

What is claimed is:

1. A system for strategy management within an organization, the system comprising:
 - 5 a shared strategic plan having a first level, a first sublevel with an inferior relationship to the first level, and a second sublevel with an inferior relationship to the first sublevel;
 - a first processing device controllable by a user having a user identification, the first processing device including
 - 10 a first memory device, and
 - a first communications module operable to communicate the user identification, to communicate a request to receive at least a portion of the shared strategic plan, and to receive the requested portion after communicating the user identification and the request;
 - 15 a second processing device coupled to the first processing device, the second processing device including
 - a second memory device that stores the shared strategic plan,
 - an administration module operable to validate the user identification has permission to receive the requested portion, and
 - 20 a second communications module operable to receive the user identification from the first processing device, to receive the request from the first processing device, and to communicate the requested portion to the first processing device when the user identification is valid; and
 - an output device coupled to the second processing device that communicates the requested portion of the shared strategic plan to the user.
 2. A system as set forth in claim 1 wherein the shared strategic plan includes a vision that sets a goal, and wherein the first level includes a strategy that describes how the vision is implemented.

3. A system as set forth in claim 2 wherein the user is assigned to implement the strategy, and wherein the administration module is further operable to assign viewer permission to the user allowing the user to receive a portion of the shared strategic plan relating to the strategy when the user is assigned the strategy.

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4. A system as set forth in claim 3 wherein the requested portion of the shared strategic plan includes the strategy, the first sublevel, and the second sublevel.

5. A system as set forth in claim 3 wherein the first communications module is further operable to communicate an edit that changes the strategy, wherein the administration module is further operable to assign edit permission to the user allowing the user to edit the strategy when the user is assigned the strategy and to validate that the user has edit permission.

6. A system as set forth in claim 2 wherein the first sublevel includes a commitment that specifies an intended result for the strategy.

7. A system as set forth in claim 6 wherein the user is assigned to implement the commitment, and wherein the administration module is further operable to assign viewer permission to the user allowing the user to receive a portion of the shared strategic plan relating to the commitment when the user is assigned the commitment.

8. A system as set forth in claim 7 wherein the portion of the shared strategic plan receivable by the user includes the strategy, the commitment, and the second sublevel.

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9. A system as set forth in claim 7 wherein the first communications module is further operable to communicate an edit that changes the commitment, wherein the administration module is further operable to assign edit permission to the user allowing the user to edit the commitment when the user is assigned the commitment and to validate that the user has edit permission.

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10. A system as set forth in claim 6 wherein the second sublevel includes a task that defines the work to occur for achieving the commitment.

11. A system as set forth in claim 10 wherein the user is assigned to implement the task, and wherein the administration module is further operable to assign viewer permission to the user allowing the user to receive a portion of the shared strategic plan
5 relating to the task when the user is assigned the task.

12. A system as set forth in claim 11 wherein the requested portion of the shared strategic plan includes the strategy, the commitment, and the task.

10 13. A system as set forth in claim 11 wherein the first communications module is further operable to communicate an edit that changes the task, wherein the administration module is further operable to assign edit permission to the user allowing the user to edit the task when the user is assigned the task and to validate that the user has edit permission.

15 14. A system as set forth in claim 10 wherein the shared strategic plan further includes a third sublevel with an inferior relationship to the second sublevel, and wherein the third sublevel includes a subtask that defines the work to occur for achieving the task.

15 15. A system as set forth in claim 1 wherein the first and second processing devices are
20 coupled via the Internet.

16. A method of implementing a shared strategic plan of an organization, the method comprising:

creating a shared strategic plan and storing the same in memory, the strategic plan including a first level, a first sublevel with an inferior relationship to the first level, and a
5 second sublevel with an inferior relationship to the first sublevel;

sending a request to receive at least a portion of the shared strategic plan from one device to another;

sending a user identification with the request;

validating that a user associated with the user identification has permission to
10 receive the requested portion; and

transmitting the requested portion when the user identification is valid; and

communicating the requested portion to the user after receiving the requested
portion.

15 17. A method as set forth in claim 16 wherein creating the shared strategic plan further includes creating a vision that sets a goal for the unit, and wherein creating a strategy includes creating a statement that describes how the vision is implemented.

18. A method as set forth in claim 17 wherein the method further comprises assigning
20 the user to implement the strategy, and assigning viewer permission to the user allowing the user to receive a portion of the shared strategic plan relating to the strategy.

19. A method as set forth in claim 18 wherein the requested portion of the shared
25 strategic plan includes the strategy, the first sublevel, and the second sublevel.

20. A method as set forth in claim 18 wherein the method further comprises:
communicating an edit that changes the strategy;
assigning edit permission to the user when the user is assigned the strategy;
validating the user identification to ensure that the user is permitted to edit the
30 strategy; and
editing the strategy when the user identification is valid.

21. A method as set forth in claim 17 wherein creating the first sublevel includes creating a commitment that specifies an intended result for the strategy.

22. A method as set forth in claim 21 wherein the method further comprises assigning the user to implement the commitment and assigning viewer permission to the user allowing the user to receive a portion of the shared strategic plan relating to the commitment when the user is assigned the commitment.

23. A method as set forth in claim 22 wherein the requested portion of the shared strategic plan includes the strategy, the commitment, and the second sublevel.

24. A method as set forth in claim 22 wherein the method further comprises:
communicating an edit that changes the commitment;
assigning edit permission to the user when the user is assigned the commitment;
validating that the user is permitted to edit the commitment; and
5 editing the commitment when the user permission is valid.
25. A method as set forth in claim 21 wherein creating the second sublevel includes
creating a task that defines the work to occur for achieving the commitment.
- 10 26. A method as set forth in claim 25 wherein the method further comprises:
assigning the user to implement the task;
assigning viewer permission to the user; and
allowing the user to receive a portion of the shared strategic plan relating to the
task when the user is assigned the task.
- 15 27. A method as set forth in claim 26 wherein the requested portion of the shared
strategic plan includes the strategy, the commitment, and the task.
- 20 28. A method as set forth in claim 26 wherein the method further comprises:
communicating an edit that changes the task;
assigning edit permission to the user;
validating the that the user is permitted to edit the task when the user is assigned
the task; and
25 editing the task when the user permission is valid.
29. A method as set forth in claim 25 wherein the shared strategic plan includes a third
sublevel with an inferior strategy to the second sublevel, the third sublevel having a task.
30. A method as set forth in claim 16 wherein the sending a request and
30 communicating the request portion are via the Internet.

31. A strategic planning tool comprising:

a strategic plan stored in memory and accessible by a plurality of users, the

strategic plan including a first level and at least one sublevel;

an overview area with a status indicator divided into coded parts;

5 a progress area including one or more commitments, a details link, a plan link, and
a commitment status indicator;

a research area; and

a contact area.

10 32. A planning tool as set forth in claim 31 wherein the status indicator is a status bar.

33. A planning tool as set forth in claim 31 wherein the strategic plan includes a unit,
and wherein the status indicator conveys the status of the unit.

15 34. A planning tool as set forth in claim 33 wherein the first level includes a strategy
for the unit, wherein the first sublevel includes the one or more commitments, wherein the
one or more commitments are commitments for the strategy, and wherein each coded part
conveys the status of a respective commitment.

20 35. A planning tool as set forth in claim 33 wherein the overview area includes a
progress link corresponding to the status indicator, and wherein the progress link connects
the overview area to the progress area.

25 36. A planning tool as set forth in claim 31 wherein the strategic plan further includes
a unit, wherein the first level includes a strategy for the unit, wherein the first sublevel
includes the one or more commitments, wherein the one or more commitments are for the
strategy, and wherein the progress area communicates the unit and the strategy.

30 37. A planning tool as set forth in claim 36 wherein the progress area further includes a
strategy status indicator.

38. A planning tool as set forth in claim 36 wherein the progress area further includes
key measures indicating the success of the unit.

39. A planning tool as set forth in claim 36 wherein the progress area further includes risks that might impact the strategy.

5 40. A planning tool as set forth in claim 31 wherein the progress area further includes a contact link that connects the progress area to the contact area.

41. A planning tool as set forth in claim 31 wherein the planning tool further comprises a vision area with a vision for the unit, and wherein the progress area further
10 includes a vision link that connects the progress area to the vision area.

42. A planning tool as set forth in claim 31 wherein the progress area further includes a contact link that connects the progress area to the contact area.

15 43. A planning tool as set forth in claim 42 wherein the contact area includes information for an administrator.

44. A planning tool as set forth in claim 31 wherein the progress area includes a research link that connects the progress area to the research area.

20 45. A planning tool as set forth in claim 44 wherein the research area includes one or more information links.

46. A planning tool as set forth in claim 31 wherein the details link connects the
25 progress area to a details area.

47. A planning tool as set forth in claim 31 wherein the plan link connects the progress area to an action plan area having an action plan.

30 48. A planning tool as set forth in claim 31 wherein the strategic plan includes at least two units, the number of units being represented by (n).

49. A planning tool as set forth in claim 48 wherein the plurality of users include a first group of users, wherein the overview area is accessible by the first group of users, wherein each unit includes a status indicator, and wherein the overview area displays each status indicator when a user of the first group of users accesses the overview area.

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50. A planning tool as set forth in claim 49 wherein the plurality of users include a second group of users, wherein the overview area displays less than (n) status indicators when a user of the second group of users accesses the overview area.

10 51. A method of implementing a shared strategic plan, the method comprising:
creating the shared strategic plan including a unit having a plurality of levels, each level having at least one item;
making the shared strategic plan accessible to a plurality of users;
assigning each item to a respective user;
15 providing an overview of at least a portion of the strategic plan to the users including providing a status indicator indicating the status of the unit;
presenting progress of the unit to the plurality of users;
providing a contact area allowing the users to communicate with each other.

20 52. A method as set forth in claim 51 wherein the method further comprises creating a research area.

53. A method as set forth in claim 52 wherein the creating a research area includes creating one or more information links.

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54. A method as set forth in claim 51 wherein the status indicator is a status bar.

55. A method as set forth in claim 51 wherein the unit is a first unit, wherein the shared strategic plan includes a second unit having a plurality of levels, and wherein
30 providing an overview of at least a portion of the strategic plan available to the users includes providing an overview of the first and second units to a first group of users, and providing an overview of the first unit to a second group of users.

56. A method as set forth in claim 51 wherein the method further comprises allowing each assigned user to edit the respective item.

57. A method as set forth in claim 51 wherein the providing a status indicator includes
5 dividing the status indicator into coded parts, each coded part conveys the status of a respective commitment.

58. A method as set forth in claim 51 wherein the creating the shared strategic plan includes creating one or more strategies for the unit, and creating one or more
10 commitments for each strategy, and wherein the presenting progress of the unit includes presenting progress of the strategy, and presenting progress of the commitment.

59. A method as set forth in claim 58 wherein the presenting progress of the strategy includes presenting a strategy status indicator indicating the status of the strategy.
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60. A method as set forth in claim 58 wherein the presenting progress of the commitment includes presenting a commitment status indicator indicating the status of the commitment.

61. A method as set forth in claim 58 and further comprising presenting risks that
20 might impact the strategy.

62. A method as set forth in claim 51 wherein the presenting progress of the unit includes presenting measures indicating the success of the unit.
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63. A method as set forth in claim 51 wherein the method further comprises presenting a vision of the unit to the plurality of users.

64. A method as set forth in claim 51 wherein the creating the shared strategic plan
30 includes creating one or more strategies for the unit, and creating one or more action plans for each strategy, and wherein the method further comprises presenting the action plan to the plurality of users.

65. A method as set forth in claim 64 wherein the creating one or more action plans includes creating one or more tasks, and wherein the presenting the action plan includes presenting the one or more tasks.